

ABM Hierarchies

Hierarchies give ABM users the ability to inherit the parent/child relationships between Named Accounts in their CRM.

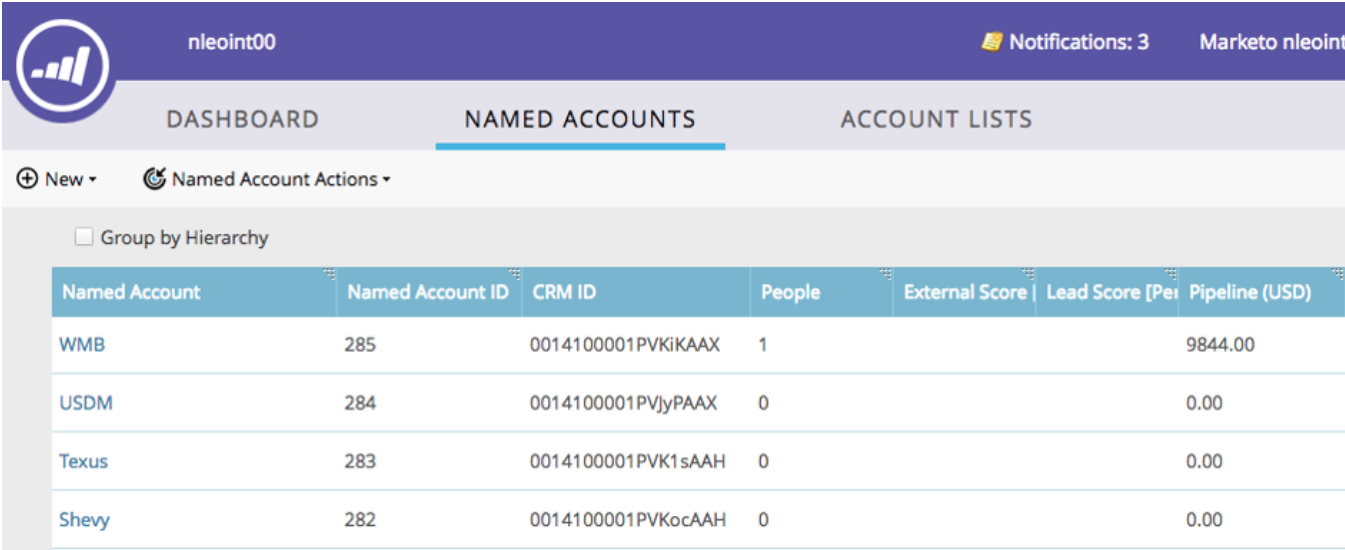
What are ABM Hierarchies?

Companies can have multiple divisions and subsidiaries. Those companies often organize themselves through parent-child relationships called hierarchies. ABM can inherit these hierarchies from your SFDC or MSD integration and allow you to work with the different divisions as a single family.

Working with ABM Hierarchies

With ABM Hierarchies, you can quickly obtain information about an entire hierarchy or individual accounts in the Named Account Dashboard.

Not using Hierarchy



The screenshot shows the Marketo interface for the user 'nleoint00'. The top navigation bar includes 'DASHBOARD', 'NAMED ACCOUNTS' (which is the active tab), and 'ACCOUNT LISTS'. Below the navigation, there are buttons for 'New' and 'Named Account Actions'. A checkbox labeled 'Group by Hierarchy' is present and is currently unchecked. The main content area displays a table with the following data:

Named Account	Named Account ID	CRM ID	People	External Score	Lead Score [Per	Pipeline (USD)
WMB	285	0014100001PVKikAAX	1			9844.00
USDM	284	0014100001PVJyPAAX	0			0.00
Texas	283	0014100001PVK1sAAH	0			0.00
Shevy	282	0014100001PVKocAAH	0			0.00

Using Hierarchy



+ New

Named Account Actions

Group by Hierarchy

Named Account	Named Account ID	CRM ID	People	External Score	Lead Score [Per	Pipeline (USD)
▲ Automobiles Group 17	269	Multiple	0			0.00
Automobiles ↑	269	0014100001PVJxHAAX	0			0.00
▼ EDM Group 4	271	Multiple	2	0 [Pending]	0 [Pending]	6175528.00
▼ JDM Group 8	273	Multiple	3	0 [Pending]	0 [Pending]	147258.00
▼ USDM Group 4	284	Multiple	0	0 [Pending]	0 [Pending]	0.00
▼ GenePoint Group 4	257	Multiple	8			1400000.00



Note

The Marketo interface will only show up to 10 levels down (child and grandchild accounts of the parent account), however there is no limit to the number of child accounts you can create.

Target and report on entire hierarchies with [one click](#).

1 - Member of Named Account

Add Constraint

Named Account: is Automobiles

Include Children: true